Pennsylvania

TOBACCO PREVENTION REPORTING SYSTEM (TPRS)

SERVICE PROVIDER USER MANUAL ADMINISTRATION MODULE

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June 2006

TABLE OF CONTENTS

ADMINISTRATION

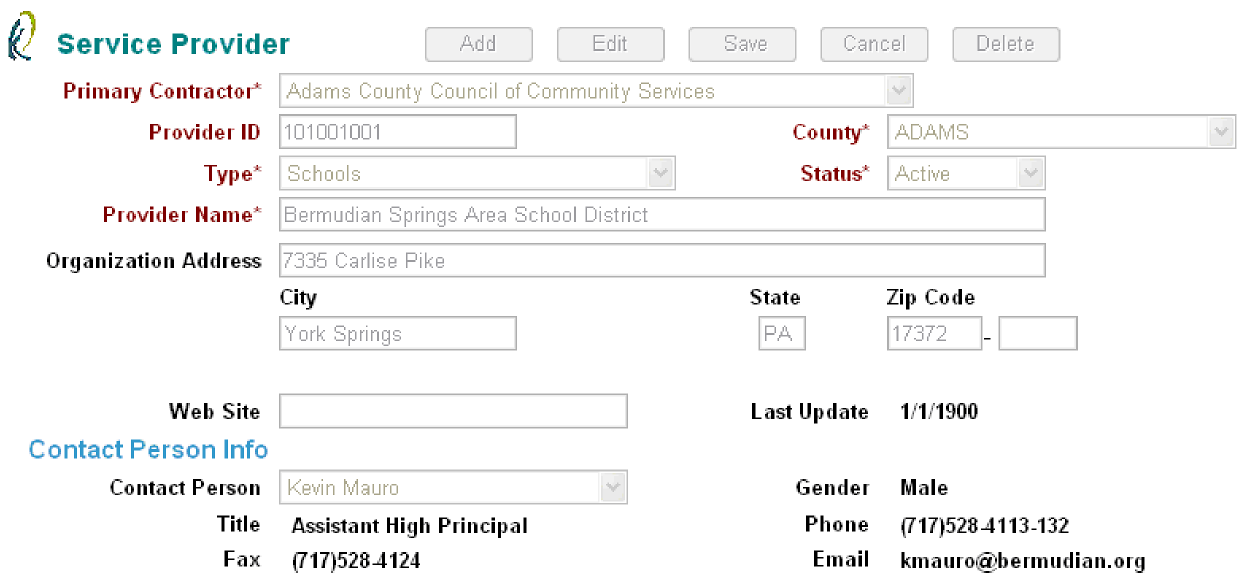
This module us used to record and maintain the staff, participants, and information contained in the TPRS. This includes but is not limited to registering staff members and participants, enter staff administration time, and maintaining the Store List used in the Enforcement module.

SERVICE PROVIDER

This module is used to record and maintain staff, participants, and information contained in the TPRS.

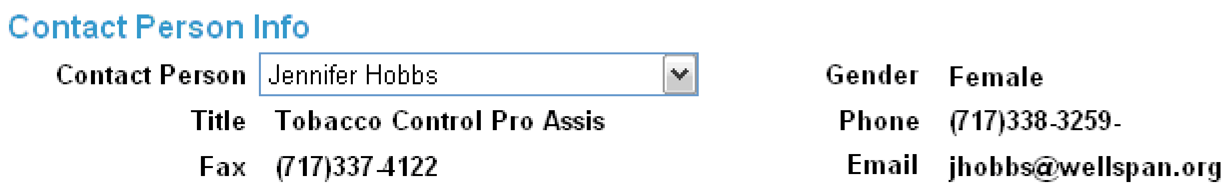
Viewing the Service Provider Screen

1. From the **Menu Box**, select the **Administration** folder.
   The **Menu Box** will reopen will subcategories displayed under the **Administration** folder.
2. From the **Administration** subcategory list, select **Service Provider**.
   The Service Provider screen will open.



Editing Service Provider Information

1. From the Service Provider screen, click the **Edit** button.
2. In the Contact Person Info section, select one of the staff members to serve as a contact person for the TPRS from the **Contact Person** dropdown list. The rest of the information will be loaded for you based on what was entered in the **Staff** module.



3. Click the **Save** button.

   *Note: To exit the screen without saving any of the changes, click the **Cancel** button.

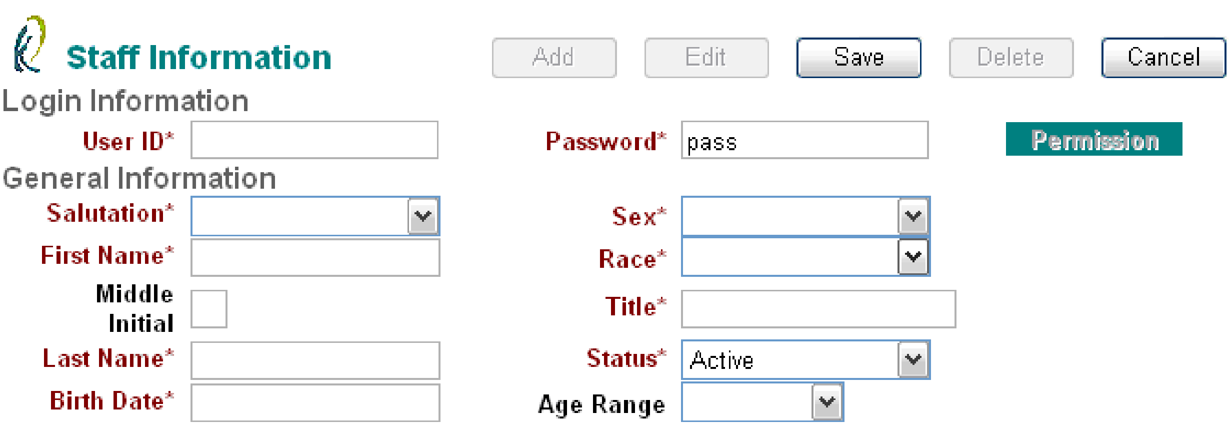
STAFF INFORMATION

This module is used to enter a new Service Provider agency staff member into the PA TPRS or edit the information about an existing one.

Note: Every new staff member is given a User ID and Password. The values entered into these fields will be the login information to the PA TPRS for the user. You should plan a User ID and Password assignment scheme carefully and secure the information for future use. If a password is lost, the user must contact the PA DOH to reset it. The user will then have to change their account password. This can be done using the **Change Password** module under the **Utilities** folder on the **Main Menu**.

Adding Staff Information

1. From the **Menu Box**, select the **Administration** folder.
   The **Menu Box** will reopen will subcategories displayed under the **Administration** folder.
2. From the **Administration** subcategory list, select **Staff Info**.
   The Staff Information screen will open.
3. Click the **Add** button.



4. Enter the staff member's Login Information.
   a. The User ID* will be the login name used by the staff member. This may be anything that you choose. Choosing a User ID and Password scheme will simplify administration. (For example: Use the first letter of the user's first name and the full last name with no spaces in between for the User ID.)
   b. The Password* field is where the temporary password is created for the staff member. This password will be used along with the User ID and Organization ID number to log into the TPRS. Once a user logs in, they can use the Change Password module to change the password to one of their liking.
5. Select a Salutation* from the dropdown list.

6. Type in the staff member's First Name*.
7. If known, type in the Middle Initial of the staff member.
8. Type in the staff member's Last Name*.
9. Enter in the staff member's Birth Date* as mm/dd/yyyy.
    a. You can also use the Age Range dropdown list directly to the right of the Birth Date* field. Once you click on the black down-arrow, a list will appear showing different age ranges. Select an age range and the system will automatically fill in a birth date within the age range (the date is estimated from today's date).

       *Note: Do not enter a Birth Date and then select an Age Range; you will lose the original birth date that you entered.
10. Select the gender of the staff member from the Sex* dropdown list.
11. Select the Race* of the staff member from the dropdown list.
12. Type in the staff member's Title*.
13. Select the Status* of the staff member. This should be set to *Active* as long as the staff member is with the organization and performing services.

    Note: Setting the Status to *Inactive* will disable the staff account (the staff member will no longer be able to log into the system). The staff member will also no longer be part of the various staff lists that appear throughout the system.

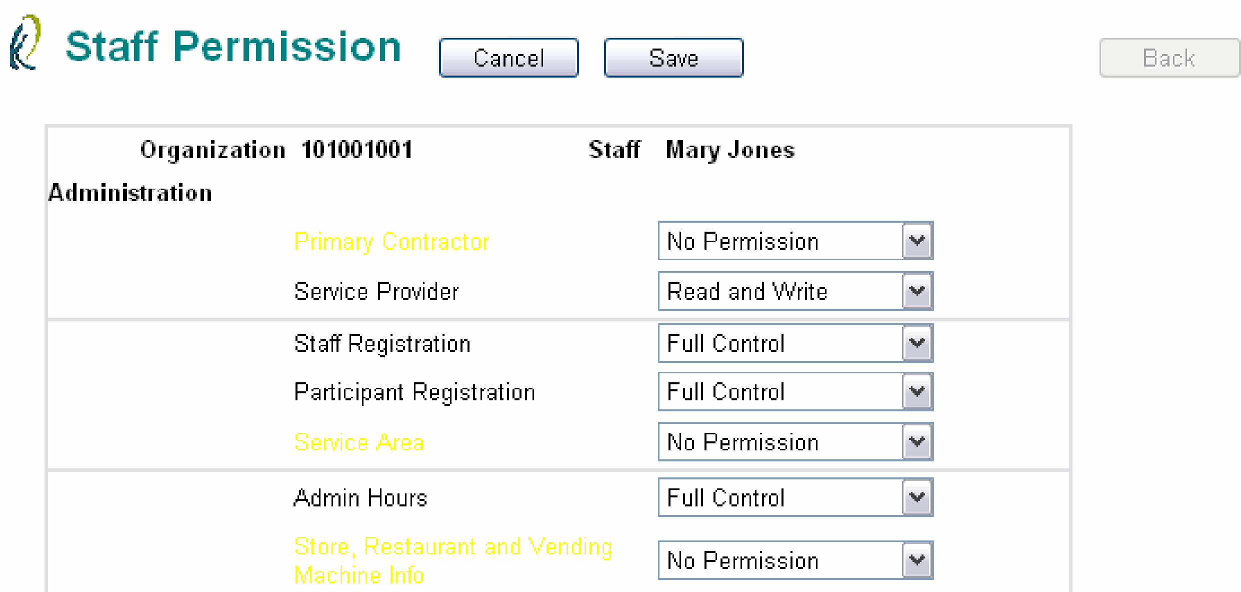
14. Select the highest education level of the staff member from the Degree* dropdown list.
15. If known, enter any completed Vocation Education for the staff member.
16. If known, enter the name of any Professional Certifications the staff member hold.
17. Enter in the staff member's Contact Information.
    a. Type the full street address of the staff member including Address, City, State and Zip Code.
    b. Type in the staff member's main Phone number and extension.
    c. Type in the staff member's Fax number.
    d. Type in the staff member's Email address.
18. Click the Save button.

    *Note: To exit the screen without saving any of the changes, click the Cancel button.
19. The permission levels for the staff member must now be set. The following section details these steps.

Setting Staff Member Permissions

The acting administrator (or primary contact) of the TPRS must set the permissions or rights that each staff member has in each module.

1. After saving the staff member's information, click the **Permission** button Permission to set up the staff member's permissions for using the TPRS.



2. Click the **Edit** button to alter the permissions for the staff member.
3. Set the permissions for each module according to the level of permissions the staff member should have.

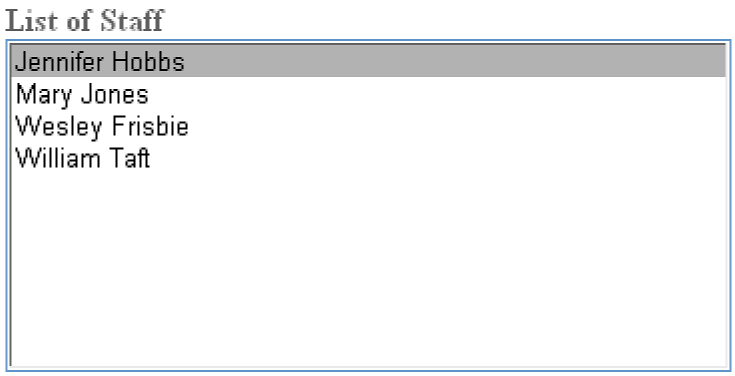
The table below defines each permission setting.

Permission	Description
No Permission	Staff will not be able to access information in a module.
Read Only	Staff can only view information in a module.
Read and Write	Staff can view, enter new information, and edit existing information in a module.
Full Control	Staff can view, enter new information, edit and delete existing information in a module.

4. Once you have set the staff member's permissions, click the **Save** button.
5. Click the **Back** button to return to the Staff Information screen.

Editing a Staff Member

1. From the Staff Information screen, select the staff member that you wish to edit from the **List of Staff** box.



2. Once the desired staff member is displayed, click the **Edit** button.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the **Backspace** and/or **Arrow** key on your keyboard to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click the **Save** button.

   ***Note**: To exit the screen without saving any of the changes, click the **Cancel** button.

Deleting a Staff Member

1. From the Staff Information screen, select the staff member that you wish to delete from the **List of Staff** box.
2. Once the desired staff member is displayed, click the **Delete** button.
3. Click **OK** when asked "If you delete this record, you won't be able to undo it. Are you sure?".

   ***Note**: If you do not want to delete this record, click **Cancel**.

PARTICIPANT INFORMATION

If your organization provides services, the participant's information needs to be registered for Recurring events (events where individual attendance is tracked).

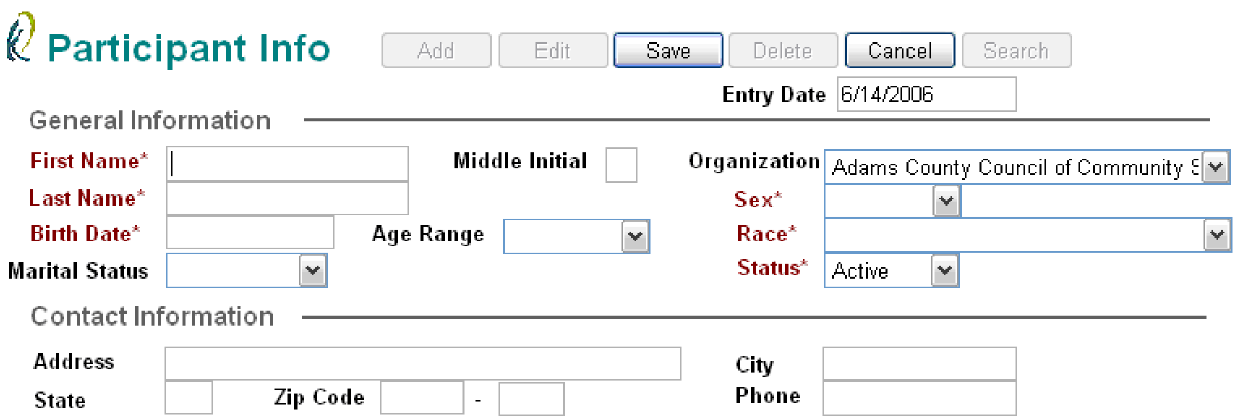
Note: The Service Provider can add, edit, delete or review participant information only for participants that are registered for services actually performed by the Service Provider.

Adding Participant Information

1. From the **Menu Box**, select the **Administration** folder.

   The **Menu Box** will reopen will subcategories displayed under the **Administration** folder.
2. From the **Administration** subcategory list, select **Participant Info**.

   The Participant Information screen will open.
3. Click the **Add** button.



4. Type in the participant's First Name*.
5. If known, type in the **Middle Initial** of the participant.
6. Type in the participant's Last Name*.
7. Enter in the participant's Birth Date* as mm/dd/yyyy.
   a. You can also use the **Age Range** dropdown list directly to the right of the Birth Date* field. Once you click on the black down-arrow, a list will appear showing different age ranges. Select an age range and the system will automatically fill in a birth date within the age range (the date is estimated from today's date).

      *Note: Do not enter a Birth Date and then select an Age Range; you will lose the original birth date that you entered.
8. Select the gender of the participant from the Sex* dropdown list.
9. Select the Race* of the participant from the dropdown list.
10. If known, select the **Marital Status** of the participant.

11. Select the Status* of the participant. This should be set to ***Active*** as long as the participant is an active participant in activities being held.

    Note: Setting the Status to *Inactive* will disable the participant. The participant will also no longer be part of the various participant lists that appear throughout the system.

12. Enter in the staff member's Contact Information.
    a. Type the full street address of the participant including **Address**, **City**, **State** and **Zip Code**.
    b. Type in the participant's **Phone** number.
13. To assign a participant to a group, click on the Program-Group pair (highlighting it) from the **Available Programs-Groups** list and click the V button to move it to the **Selected Programs-Groups** list.
    a. To remove a Program-Group pair from the **Selected Programs-Groups** list, click the Λ button to move it back into the **Available Programs-Groups** list.
14. Click the **Save** button.

    *Note: To exit the screen without saving any of the changes, click the **Cancel** button.

Editing Participant Information

1. From the Participant Information screen, click the **Search** button to locate a participant that has already been entered into the system.
   *Note: For detailed information on searching for a participant, refer to Using the Search Feature located at the end of this document.
2. Once the desired participant is displayed, click the **Edit** button.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the **Backspace** and/or **Arrow** key on your keyboard to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click the **Save** button.
   *Note: To exit the screen without saving any of the changes, click the **Cancel** button.

Deleting Participant Information

1. From the Participant Information screen, click the **Search** button to locate a participant that has already been entered into the system.
   *Note: For detailed information on searching for a participant, refer to Using the Search Feature located at the end of this document.
2. Once the desired participant is displayed, click the **Delete** button.
3. Click **OK** when asked "If you delete this record, you won't be able to undo it. Are you sure?".
   *Note: If you do not want to delete this record, click **Cancel**.

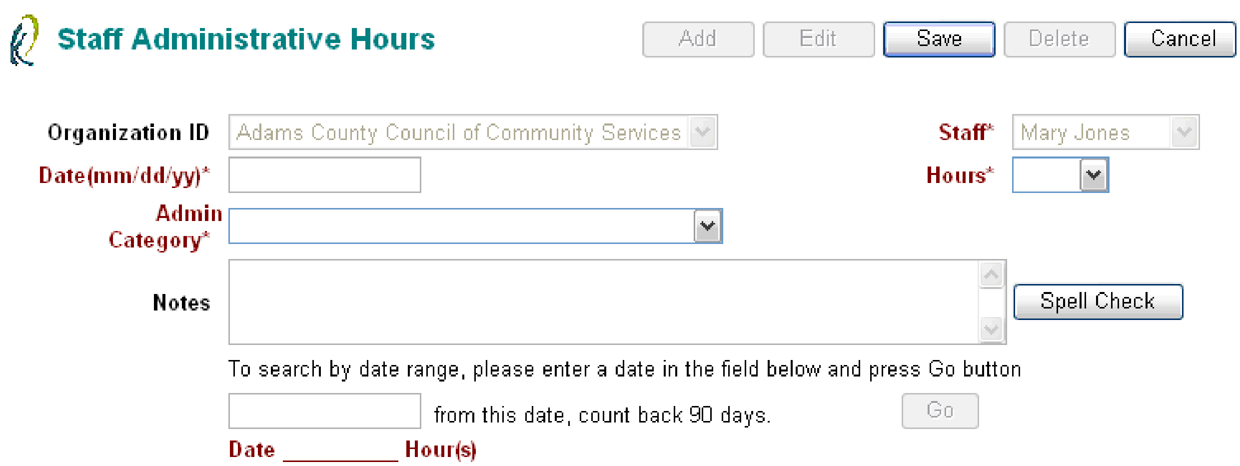
STAFF ADMINISTRATIVE HOURS

This module is used by a staff member to track his/her administrative hours, which are non-service related hours. You may wish to do this for hourly employees or for grant requirements. This presents the opportunity to track every hour that is put into a project regardless if it can be tied to a specific service.

Note: A staff member's service related hours (hours that can be associated with a particular program) are entered in the **Activities** module. Administrative hours are hours that **CANNOT** be associated with a service. Examples of Administrative hours are: entering data into the TPRS, writing new yearly objectives, etc.

Adding Administrative Hours for a Staff Member

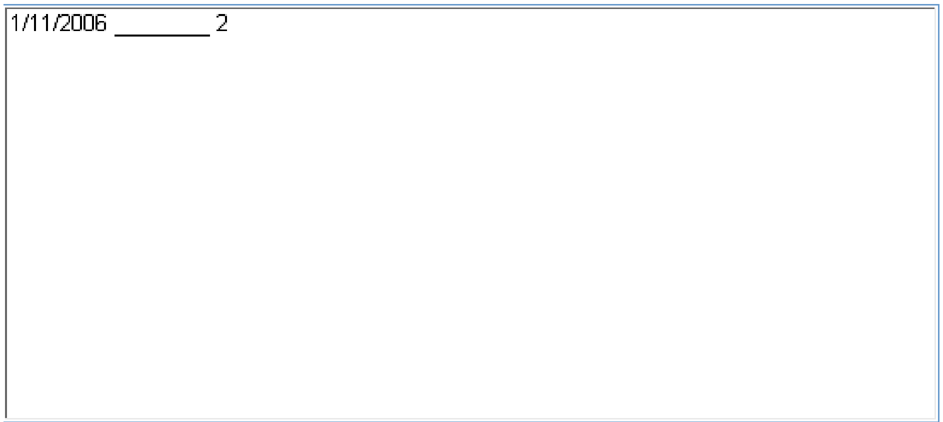
1. From the **Menu Box**, select the **Administration** folder.
   The **Menu Box** will reopen will subcategories displayed under the **Administration** folder.
2. From the **Administration** subcategory list, select **Admin Hours**.
   The Staff Administrative Hours screen will open.



3. Select a staff member from the Staff* dropdown list.
4. Click the **Add** button. The Staff Administrative Hours screen will display the **Organization ID** and **Staff** fields grayed out.
5. Type in the Date* as mm/dd/yy.
6. Select the approximate number of hours of administrative time you are adding from the Hours* dropdown list.
7. Select the type of activity that was performed from the Admin Category* dropdown list.
8. Type in any additional information regarding this time in the **Notes** field.
9. Click the **Save** button.
   *Note: To exit the screen without saving any of the changes, click the **Cancel** button.

Editing Staff Administrative Hours

1. From the Staff Administrative Hours screen, select a staff member from the Staff* dropdown list.
2. From the box located at the bottom of the Staff Administrative Hours screen, select the date you wish to edit.



3. Once the desired time is displayed, click the **Edit** button.
4. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
5. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the **Backspace** and/or **Arrow** key on your keyboard to delete the unwanted characters from the field. Then type the information you want in the field.
6. Repeat steps 4-5 until all of the fields have been modified the way you want them.
7. Click the **Save** button.

   ***Note**: To exit the screen without saving any of the changes, click the **Cancel** button.

Deleting Staff Administrative Hours

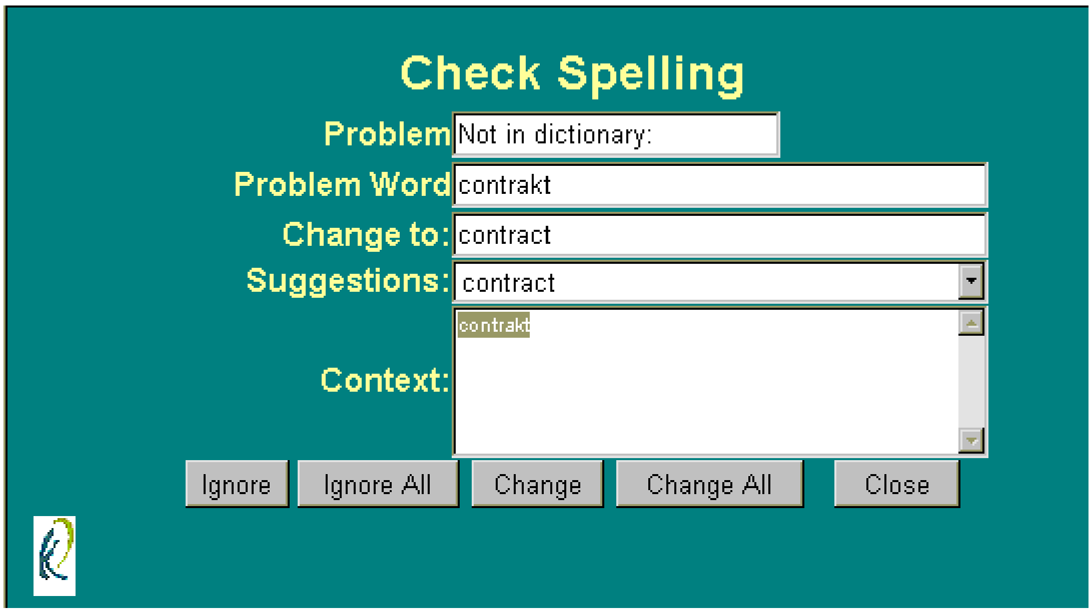
1. From the Staff Administrative Hours screen, select a staff member from the Staff* dropdown list.
2. From the box located at the bottom of the Staff Administrative Hours screen, select the date you wish to delete.
3. Once the desired time is displayed, click the **Delete** button.
4. Click **OK** when asked "If you delete this record, you won't be able to undo it. Are you sure?".

   ***Note**: If you do not want to delete this record, click **Cancel**.

APPENDIX

Spell Check Feature

A spell check feature has been added to various sections of the PA TPRS to help eliminate spelling errors. The following section details the various options in the Check Spelling page. When the Spell Check button has been selected a new window will appear displaying the Check Spelling page. The spell check feature will look at any words written within a text box or field.



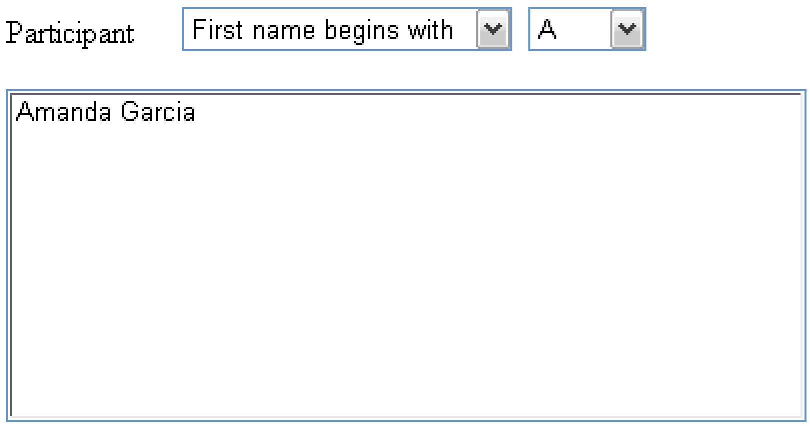
The following table is a summary of options in the spell check feature.

Option	Description
Change to	When the **Change** button is clicked, the value in the **Change to** box will replace the highlighted misspelled word and the spell checker will continue to the next word. You may type in this field if an appropriate suggestion is not present in the **Suggestions** drop down.
Suggestions	A drop down box of spelling suggestions for the misspelled word. If the word is misspelled but not available as an option in the **Suggestions** drop down – you may type the correct spelling in the **Change to** box.
Ignore	Disregards the misspelling in the highlighted word only and continues to the next word. The next occurrence of the misspelled word will be highlighted for correction.
Ignore All	Disregards the misspelling in the highlighted word and all future occurrences of the word. You will no longer be prompted to fix the spelling. An example when to use this is if your name was highlighted as misspelled – this would be a case to ignore all.
Change	Changes the spelling of the highlighted word to the selected **Change to** word.
Change All	Changes the spelling of the highlighted word to the selected word and all future occurrences of the word.
Close	Closes the Check Spelling window.

Using the Search Feature

When going into an area where the search option is available, the service will default the view to data that was entered previously, or blank fields if there have not been any data entered. To view or edit data that has already been entered, you will need to use the **Search** button and use the following instructions to find this data.

1. Select the **Search** button from the screen in which you are currently working. New fields will appear.



2. From the first box, select the type of search you want to perform.
3. Type or select the criteria you want to use in this search in the second box.
4. The results of the search are displayed on the screen in the box below the selection fields.
5. Select the record you want to open by highlighting it.
6. To exit the Search feature, click the **Search Off** or **Back** button.
7. Click the **Edit** button to open the record for changes. Click **Save** to save those changes.

